

**COUNTY OF SAN LUIS OBISPO BOARD OF SUPERVISORS
AGENDA ITEM TRANSMITTAL**

(1) DEPARTMENT Assessor	(2) MEETING DATE 3/8/2016	(3) CONTACT/PHONE Charron Sparks - 781-5646	
(4) SUBJECT Request to approve a FY 2015-16 Imaging Services Agreement with BMI Imaging Services in the amount of \$94,455 for the imaging of annotated archival recorded deed documents in the Assessor's Office. All Districts.			
(5) RECOMMENDED ACTION It is recommended that the Board approve the Imaging Services Agreement in the amount of \$94,455 with BMI Imaging Systems to image the annotated archival recorded deed documents in the Assessor's Office.			
(6) FUNDING SOURCE(S) General Fund	(7) CURRENT YEAR FINANCIAL IMPACT \$94,455.00	(8) ANNUAL FINANCIAL IMPACT \$1800.00	(9) BUDGETED? Yes
(10) AGENDA PLACEMENT <input checked="" type="checkbox"/> Consent <input type="checkbox"/> Presentation <input type="checkbox"/> Hearing (Time Est. ____) <input type="checkbox"/> Board Business (Time Est. ____)			
(11) EXECUTED DOCUMENTS <input type="checkbox"/> Resolutions <input checked="" type="checkbox"/> Contracts <input type="checkbox"/> Ordinances <input type="checkbox"/> N/A			
(12) OUTLINE AGREEMENT REQUISITION NUMBER (OAR) N/A		(13) BUDGET ADJUSTMENT REQUIRED? BAR ID Number: <input type="checkbox"/> 4/5 Vote Required <input checked="" type="checkbox"/> N/A	
(14) LOCATION MAP N/A	(15) BUSINESS IMPACT STATEMENT? No	(16) AGENDA ITEM HISTORY <input checked="" type="checkbox"/> N/A Date: _____	
(17) ADMINISTRATIVE OFFICE REVIEW Lisa M. Howe			
(18) SUPERVISOR DISTRICT(S) All Districts			

County of San Luis Obispo



TO: Board of Supervisors

FROM: Assessor / Charron Sparks - 781-5646

DATE: 3/8/2016

SUBJECT: Request to approve a FY 2015-16 Imaging Services Agreement with BMI Imaging Services in the amount of \$94,455 for the imaging of annotated archival recorded deed documents in the Assessor's Office. All Districts.

RECOMMENDATION

It is recommended that the Board approve the Imaging Services Agreement in the amount of \$94,455 with BMI Imaging Systems to image the annotated archival recorded deed documents in the Assessor's Office.

DISCUSSION

Background

The Assessor's primary responsibility is to annually determine the proper taxable value for each property so the owner is assured of paying the correct amount of property tax. The County Assessor must annually assess all taxable property in the county, except for state-assessed property, to the person, business, or legal entity owning, claiming, possessing, or controlling the property on January 1. To follow these constitutional and statutory duties includes determination of all changes in ownership to taxable real property, and such a determination requires careful tracking of all ownership interests in real property. The Clerk Recorder's Office is required to submit copies of all recorded documents evidencing a change in ownership to the Assessor (California Revenue and Taxation Code section 255.7).

Prior to 2003, which was the year the Clerk Recorder's Office was able to start transmitting scanned images of documents to the Assessor's Office, all documents were submitted as paper copies. These paper copies include critical assessor annotations made by the Mapping Section and the Transfer Section. Currently, the Assessor's Office is storing all paper documents with assessor annotations recorded from March 1969 through December 2002, which are over 1,100,000 pages of historic information vital to the accurate assessment of real property.

The annotations include the original determination of the assessment numbers described in the document, and notes of any problems with the legal description. In addition, there are notes about conversations with assessees, dates of death, actions taken, decisions made, and cross-references to related and/or correction documents.

In order to track ownership of real properties within the county, as required by law, these historical documents are referred to daily. With the constant handling over the years, these documents, with irreplaceable historical notes, are gradually deteriorating.

Currently the documents are stored in a series of special binders, with between 500 to 800 pages in each binder. The shelving units take up approximately 235 square feet of valuable floor space. Not only is the floor space needed for other purposes, but the documents are gradually deteriorating with ongoing use. The documents are accessed multiple times every day. If they were in digital format, they would be accessed even more frequently because people using the documents are accustomed to being able to view document images on their computer. Viewing the hardcopy documents is inefficient and each usage degrades the documents further.

Project Overview

This project would digitally store all the documents and allow staff to continue to make working notes on the documents as problems are resolved. When the annotated copies are available for digital viewing, not only will staff be able to work

more efficiently, but they will have more accurate information for research. Errors usually mean revisions, which require time-intensive data input by the Assessor's Office and the Auditor-Controller-Treasurer-Tax Collector's Office, as well as follow-up phone calls and explanations to both offices by confused and/or angry tax payers. In addition, the elimination of the stored paper documents would provide space needed for the proper storage of the Assessor's historical maps.

BMI Imaging was selected for the project because BMI is familiar with the County's documents having digital preserved documents for both the Assessor and the Clerk Recorder, the system is already being used for millions of documents accessed routinely by assessor staff, and the system is the only available that will allow staff to continue to make working notes on the documents as problems are resolved. Introducing a new system into the County's technology maze would require staff to access similar documents using a divergent and inconsistent technology. A non-BMI document retrieval system will most likely not allow for critical ongoing working notes to be added to the documents resulting in future inefficiencies as staff conducts research previously conducted and resolved.

OTHER AGENCY INVOLVEMENT/IMPACT

County Counsel has approved the agreement as to form and legal effect.

FINANCIAL CONSIDERATIONS

Funding of \$100,000 is in the Assessor's approved current FY 2015-16 budget. The final cost for the project is \$94,455 and the current monthly hosting fee of \$100/month will be increased to \$250/month once the project is complete and the documents are available within Digital Reel as digital images.

RESULTS

These annotated documents are important research information both for ownership and mapping purposes to track and properly assess property. Assessment ownership and maps are required not only for the generation of revenue through property taxes, but are relied on by other county offices and the public.

The deterioration of the annotated paper documents and potential loss of irreplaceable information will be abated with preservation through digital scanning. In addition, immediate access to research documents will increase efficiency and accuracy for the staff that need to view them, and will help to reduce expensive errors. Errors usually mean revisions, which require time-intensive data input by the Assessor's Office and the Auditor-Controller-Treasurer-Tax Collector's Office, as well as follow-up phone calls and explanations to both offices by confused and/or angry tax payers. Working in an effective manner and the elimination of errors supports the Department Mission of providing accurate property assessment which in turn supports the County's goal of a well governed community.

The project will digitally preserve and store approximately 1,100,000 pages, which is approximately 1,240 books of deeds. Nineteen shelving units that take up approximately 235 square feet of valuable floor space would be removed freeing up space for the much needed historical map preservation cabinets and other uses.

In addition, this will be another step forward in the County's goal of reducing the storage of paper. The County's Technology Strategic Plan, Objective 1.6, states:

Concerns exist about the requirement to manage large volumes of paper-based information. The ability to rapidly locate documents requested through formal public information requests is becoming increasingly more difficult and requires significant manual labor to search, recover, and produce documents.

- Develop a strategy and plan for existing documents, including the scanning of paper or reimagining of non-paper documents

ATTACHMENTS

1. Imaging Services Agreement and Description of Services